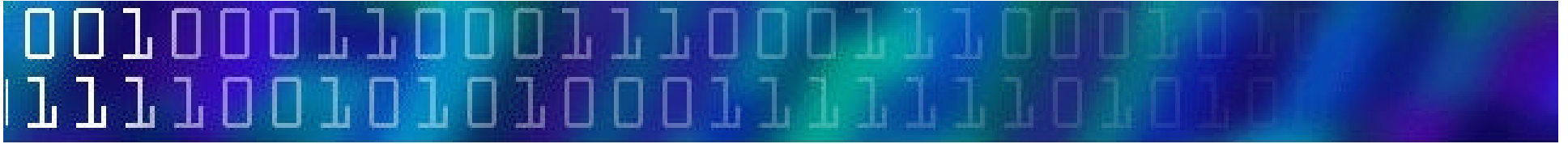


APPENDIX A-1





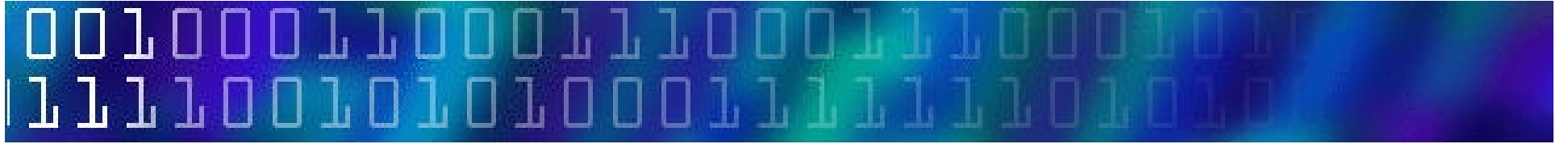
NASFAA Executive Board

April 29, 2000

Kay Jacks

General Manager, Schools Channel





School Portal Initiative







Welcome, Ann Marie! 1:42 PM - 12/14/99

Advertisement



Records

Products

Services

Systems

Forms/Pubs

Training

DL News

Help

Search SFA for

Forms and Publications

containing

Search

My Shortcuts

[Technical Resource Library](#)
[Compile FISAP](#)
[Direct Loan Bulletins](#)
[NASFAA](#)

My Views

Functions and Views	View
Loan Origination	
Loan Counseling	
Student Records	
Financial Aid System	
Bursar/Business Office	


[SSN Verification](#)

[EFC Verification](#)

SFA - We're Here To Help

 [Download SFA Coach](#)
 [Register with SFA University](#)
 [Chat with SFA](#)
 [Send SFA E-Mail](#)

Today's Headlines

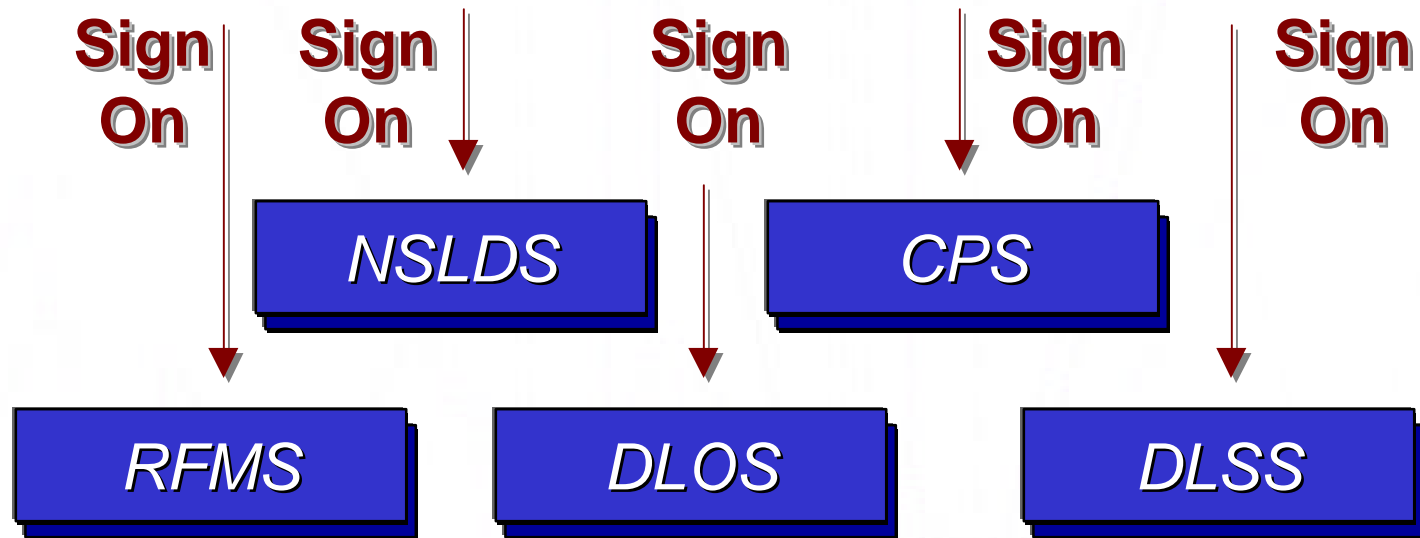
[SFA Announces Eliminates Mid-year FAT](#)
[Entrance Counseling Results Sent to Schools Electronically](#)
[DL System Live for 2000-2001](#)

"We help put America through school."

SFA Schools Portal, Version 0.0

Portal - Version 1.0, Sept. 2000

- ✓ “Baby” customization (by school)
- ✓ Home Page to manage content
- ✓ Links to all existing SFA web-sites
- ✓ Links to all web-enabled operating systems
- ✓ Document and “Key Word” search
- ✓ Feedback loop




◆ **Calendar**

◆ **ED/ SFA News**

◆ **System Alerts**

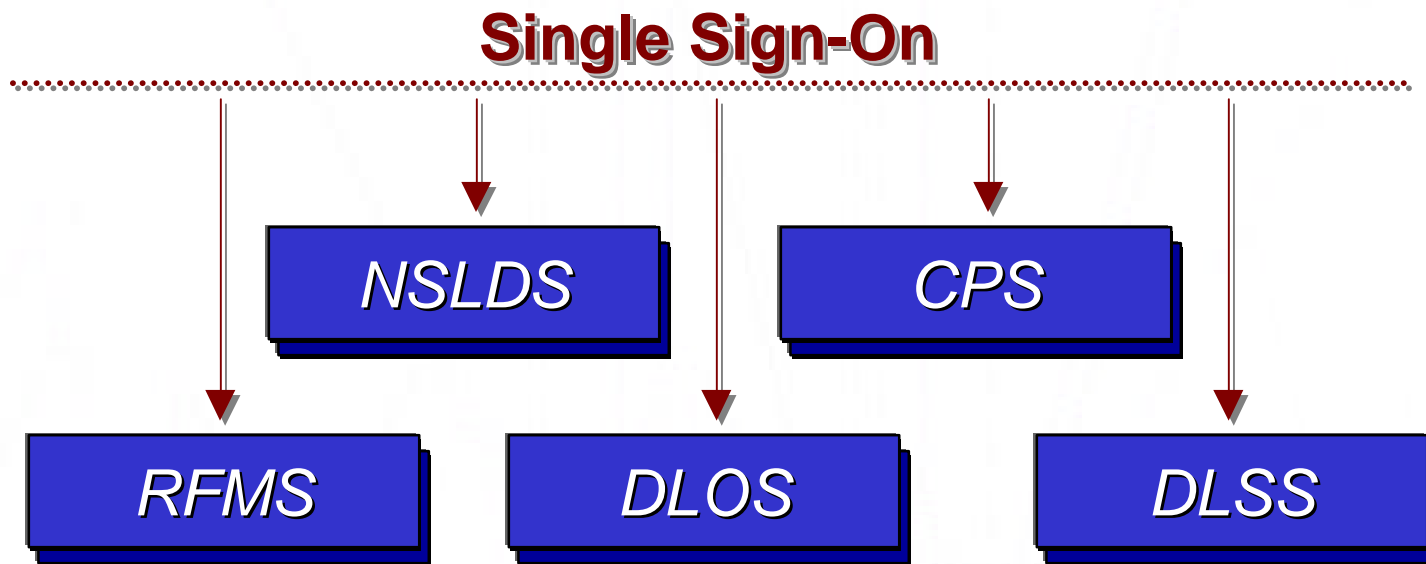
◆ **“My Shortcuts”**

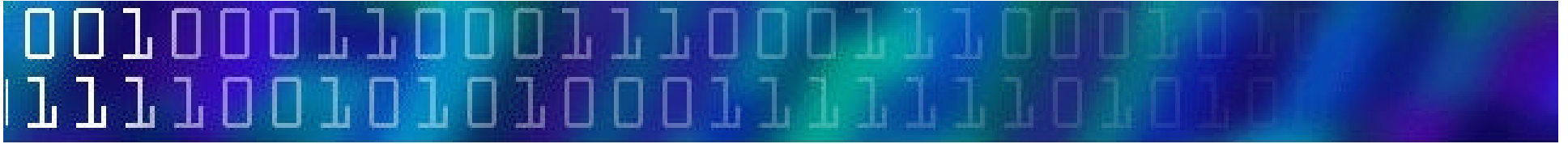
◆ **Content Management (examples)**

- ✓ Review or Submit Student Records (link to RFMS, LOS, NSLDS)
 - ✓ Book Store (order documents, materials, use SFA Download)
 - ✓ Training/Conferences (link to SFA Coach, Conferences Sites)
 - ✓ On Line Library (link to IFAP documents)
 - ✓ Funding (link to GAPS)
 - ✓ Contact Us (send e-mail, access lists of current phone numbers)
 - ✓ Program Participation (link to E-App, PEPS on the Web)
- 

Portal - Version 2.0 TBD

- ✓ Increased customization
- ✓ Ability to set up variety of user types
- ✓ Single sign-on to operating systems

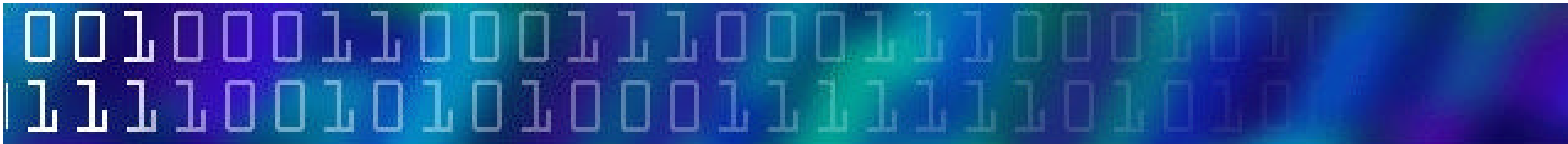




3 CONCURRENT ACTIVITIES

- ①** Portals
- ②** Review of Edits
- ③** Common Origination and Disbursement





COMMON ORIGINATION AND DISBURSEMENT

A Conceptual Design for
Pell, Direct Loans, and Campus-Based



Current Processes...

- Time focused on managing systems not serving students
- Inadequate access to student and school data
- Don't support full integrity of the programs
- Cost us \$427 million





Where We Are Going

Common Process...

- Common process for Pell, Direct Loans and campus-based funds
- Full access to data for those with a right to know
- Best possible source as close to real time as possible
- Pilot for 2002-03 roll-out

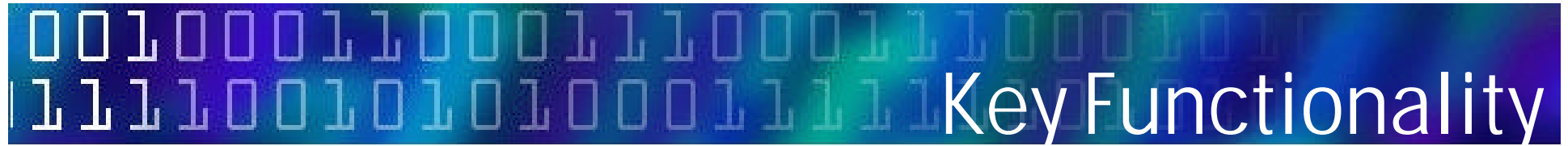




Design Principles

- Common definitions
 - Shared data definitions across programs
 - Common core processes: originating, reporting, reconciliation
- Best data
 - From best possible source, eliminating redundancies
- Easy Access
 - Internet-Based
 - Leverage latest technology for seamless interfaces
- Edits focused on data integrity/compliance
 - Same edits across programs
 - Elimination of intra-system edits





Key Functionality

- ✓ Access to student history data
- ✓ Access to institutional research data
- ✓ Utilization of a common process for all programs



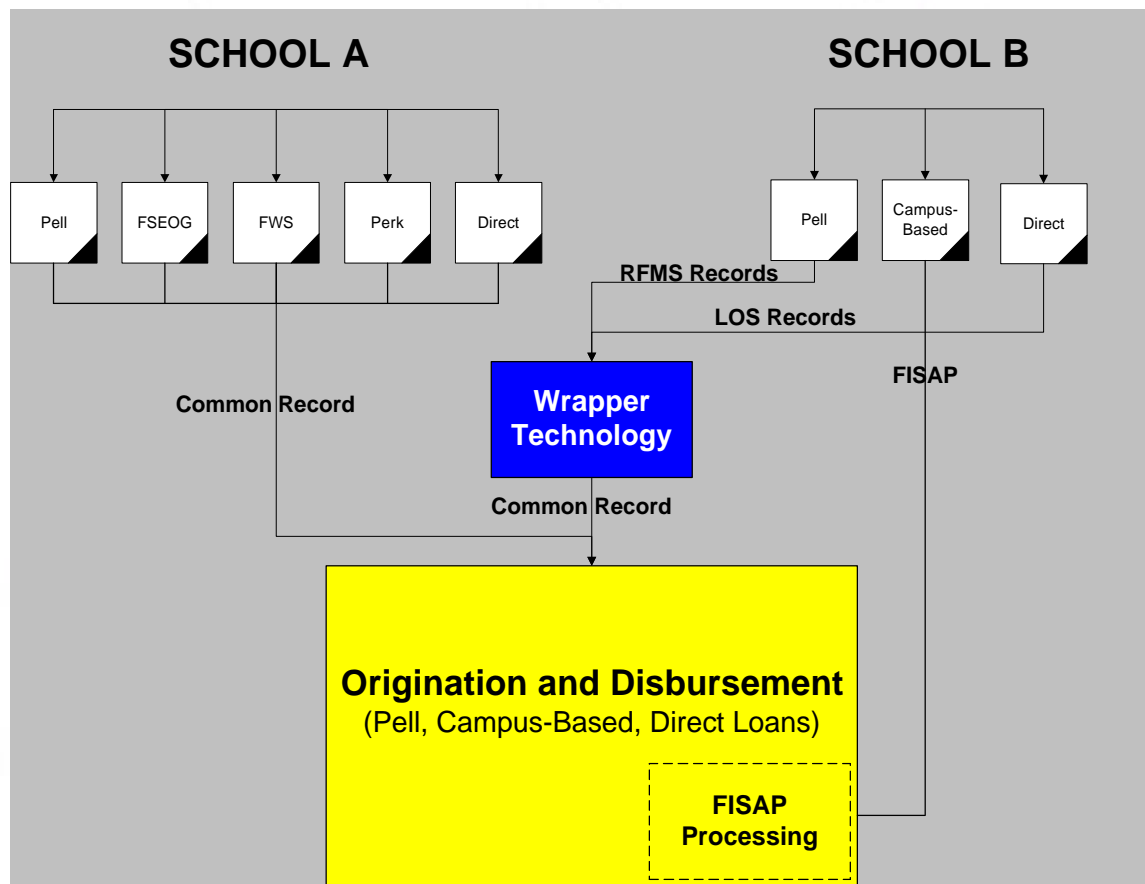
1 Create Common Payment Request Record

- The institution creates a single Title IV Common Payment Request Record for each eligible student
- This record contains a student identifier and data needed to request payment for Title IV programs.

Student Identifier	Last Name	First Name	Middle Initial	Street Address	Pell	DL	Campus Based	...
--------------------	-----------	------------	----------------	----------------	------	----	--------------	-----

Flexibility

- SFA will develop middleware to accept current record layouts, allowing schools to migrate to common record as they are ready



- Year-end student detail reporting for Campus Based programs
- Funding Method Options for Pell & Direct Loan



**“Just-In-Time”
and/or
Advanced Draws**

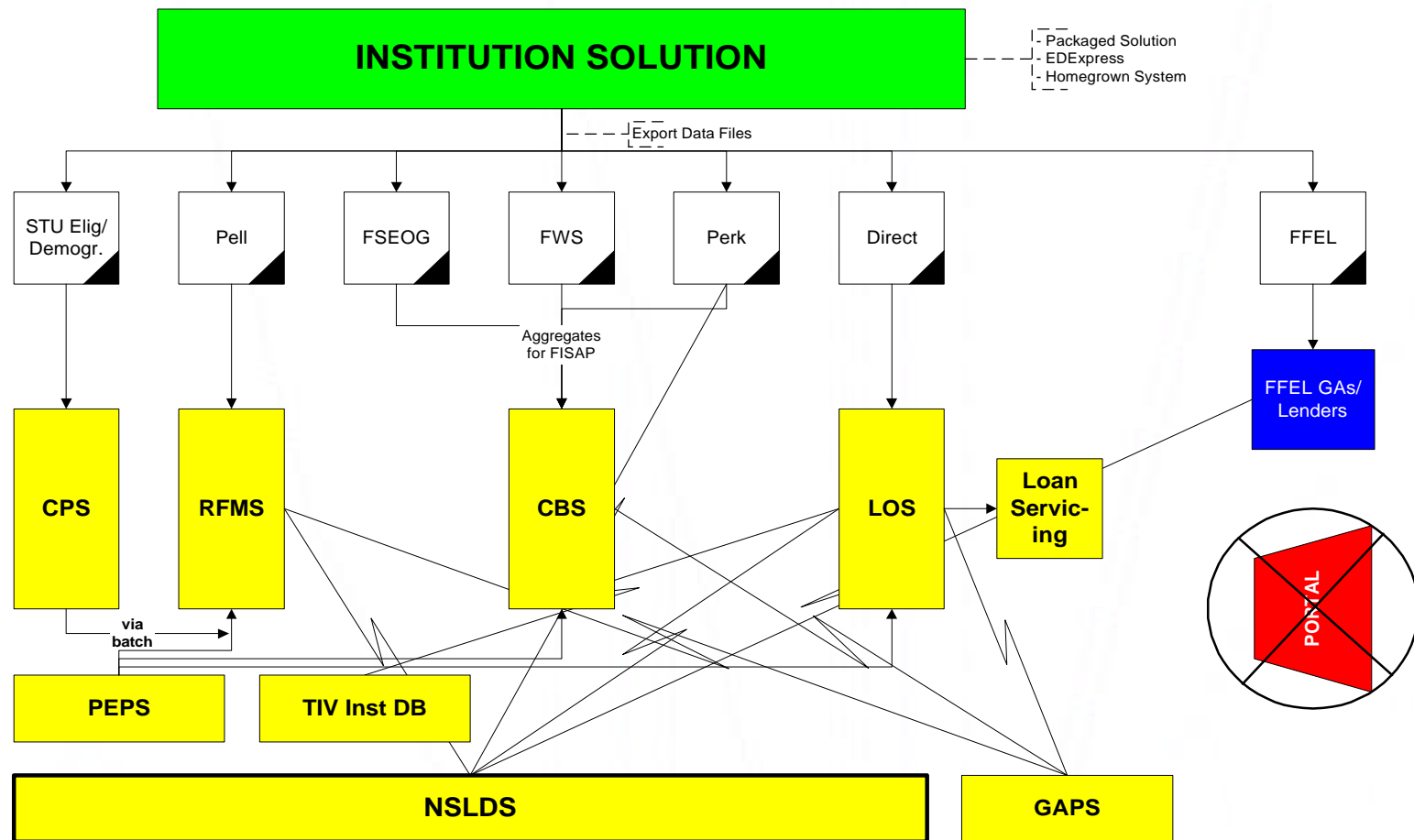


EXAMPLE

- Getting ready to start Fall semester and wants funds before school begins
 - Draws down \$3 million
- Upon confirming actual enrollment, School A disburses funds to eligible students
- School A submits records for all disbursements, totally \$5.5 million
 - ED/ SFA transmits \$2.5 million



Current Systems without Middleware

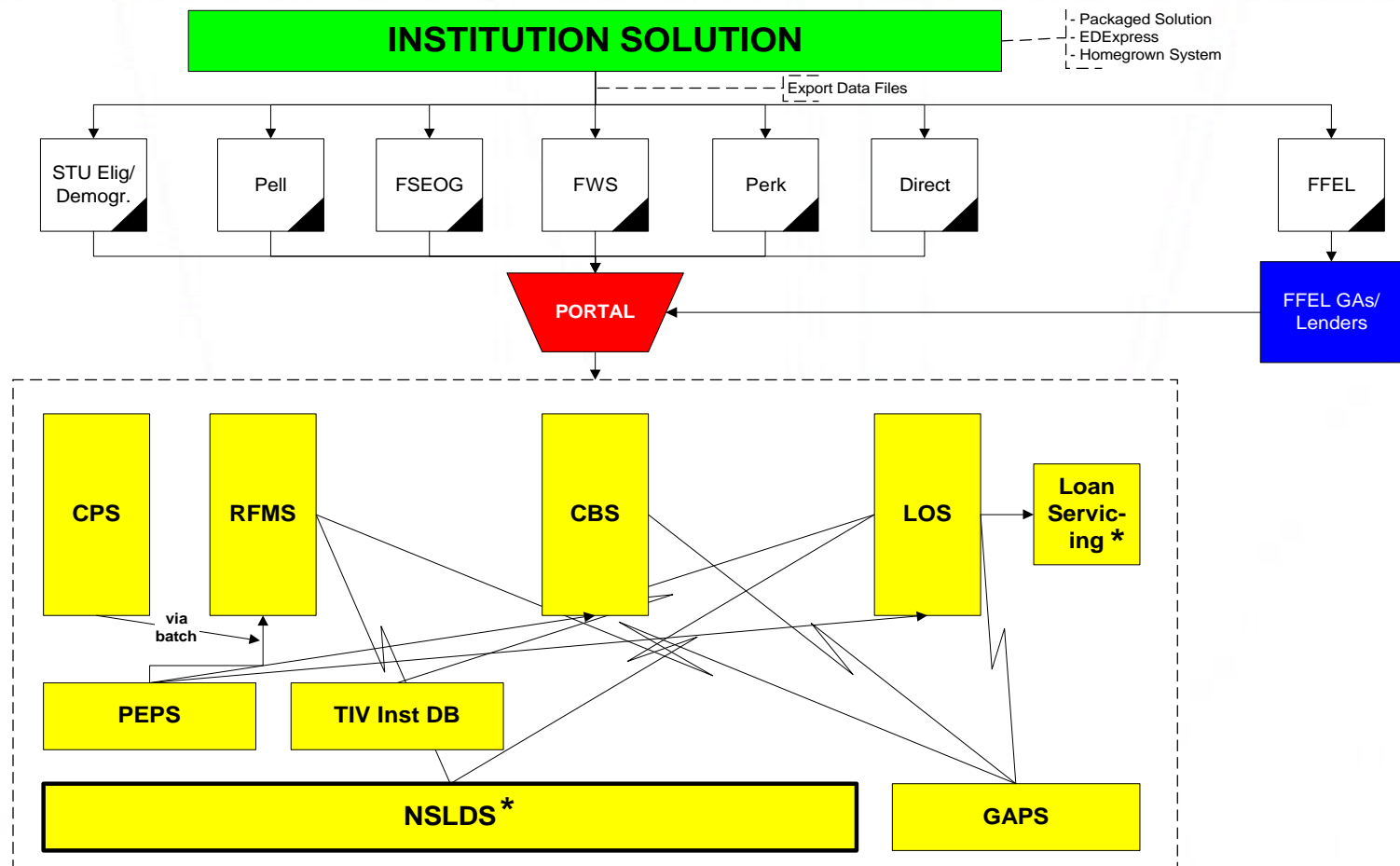


- varying business rules
- four distinct processes at schools and ED
- lost data/ data "chasing" (students, schools, ED)
- moving data via batch as opposed to data sharing
- redundant data and conflicting data

- no common edits
- few systems share data

- no "whole picture" for students, schools, ED

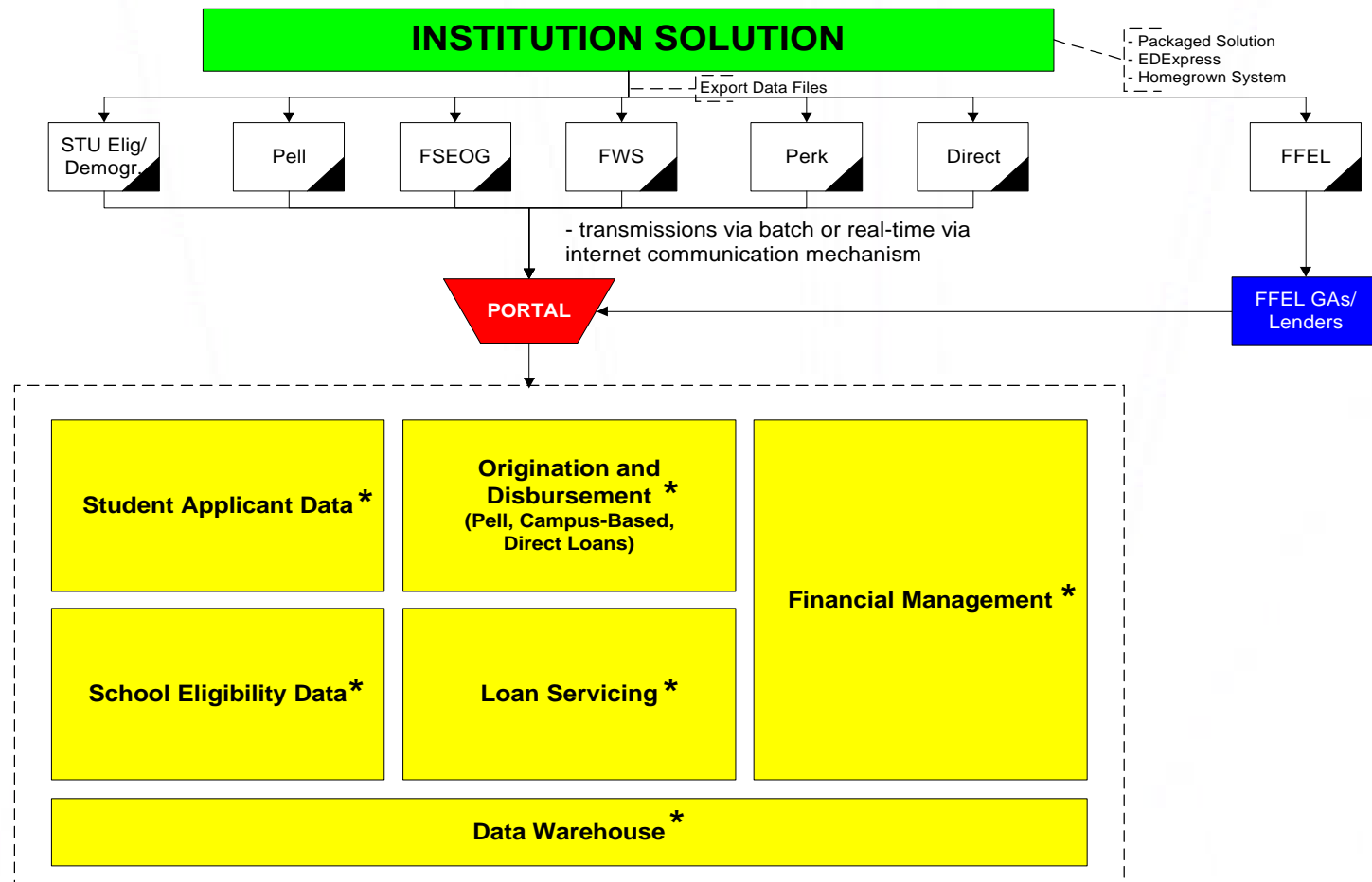
Current Systems with Middleware



- varying business rules
- four distinct processes at schools and ED
- data 'fetching' as opposed to data sharing
- redundant data and conflicting data
- no common edits
- will not effectively support data warehouse

- "whole picture" for students, schools, ED
 - systems providing data to portal noted by "*"
 - not real-time
 - data integrity issues

Reengineered Systems with Middleware

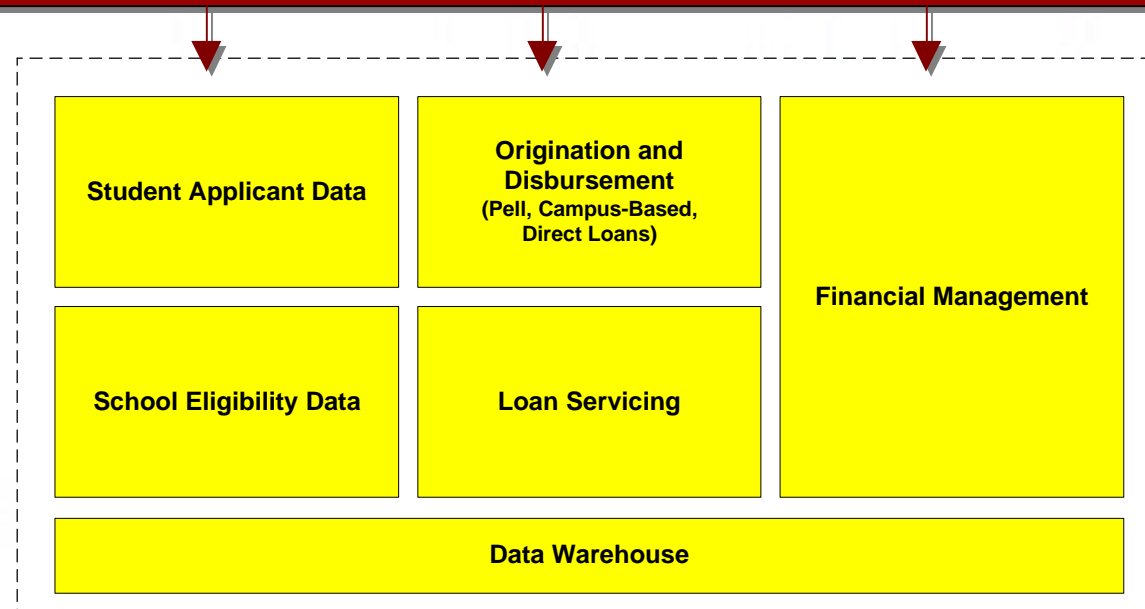


- data stored once, aligned with business practices
- real-time data sharing without data transfer
- real-time, continuous tracking of data
- real-time, continuous validity checking
- common edits across program when necessary

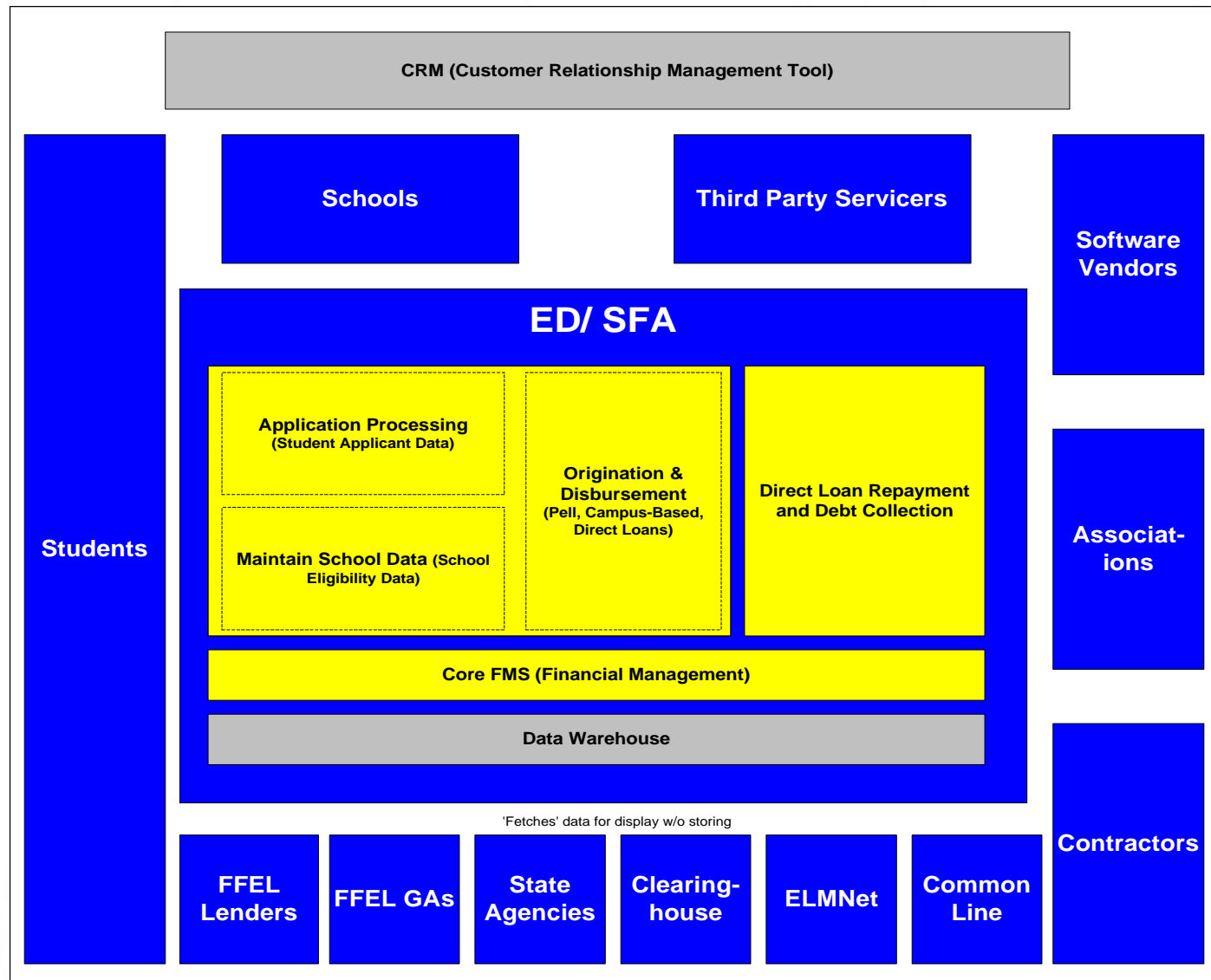
- portal "points" users to best source
- one process for getting funds for schools
- **real-time, accurate "whole picture" for students, schools, ED/ SFA**
- **systems that will provide data to portal noted with "*"**

Portal - Desired Outcome

- ✓ Customization by single user
- ✓ Direct interface with operating systems
- ✓ Access to query, download from operating systems and data warehouse
- ✓ Ability to create data marts for analysis



Virtual SFA



Conceptual Model

